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How advisors are approaching digital marketing in 2025

By Rob Burgess
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As advisors strive to optimize and reevaluate their marketing budgets, firms are responding with new digital tools and platforms to meet their needs.

Last week, San Diego-based LPL Financial introduced its new Digital Marketing Platform, which includes a library of financial news content and LPL Research, automation tools, review and compliance approval workflows, AI-powered content recommendations and real-time reporting.

Also last week, Birmingham, Alabama-based RFG Advisory presented an updated platform and website, which features annual marketing and growth planning sessions, coupled with a marketing stipend and behavioral finance coaching.

William Trout, director of securities and investments at technology data firm Datos Insights, said these advancements show the digital marketing landscape for financial advisors has undergone a fundamental transformation.

"Modern platforms now integrate marketing, practice management and compliance into comprehensive solutions, moving away from disconnected tools toward unified ecosystems," he said.

But while much has changed in terms of digital marketing, many in the industry say the core concept of connecting directly with clients and prospects on a human level hasn't.

Connecting with clients and prospects with podcasts, video and more

Digital marketing for advisors is no longer about just having a website or LinkedIn profile, said Daniel E. Milks, co-founder and operations officer of Woodmark Wealth Management in Greenville, South Carolina.

"It's about creating a holistic, engaging and client-focused online presence," he said. "Advisors now need to show their value proposition through educational content, personalized messaging and interactive tools like financial calculators or video consultations."

Greg Banasz, chief marketing Officer at Steward Partners in Washington, D.C., said he has found video promotion is the most effective form of digital advertisement.

"When advisors and teams can produce a visual of who they are and what they do in a video to clients and prospects, they connect on a whole new level," he said. "As desktop and mobile video equipment has become so advanced and user-

friendly, highly skilled editors can take high-resolution raw content and turn it into a studio-like experience and connect on a very personalized level with their intended audience."

Sam Littlefield, president and CEO of the advertising firm Littlefield Agency, said podcasts, like videos, are a "huge opportunity" for advisors looking to connect on a personal level.

"We have a financial institution client launching a podcast for a specific vertical they are growing in and it's a fantastic way to get in front of their target audience and position themselves as the expert within said vertical," he said.

Lawrence D. Sprung, founder of Mitlin Financial in Hauppauge, New York, said his firm's digital marketing strategy — especially with video, podcasts and email newsletters — involves enhancing visibility and building and growing trust.

"The content people connect with most are the personal touches, the pieces that speak to who we are," he said. "Seeing me on video and living my life builds trust via the para-social relationship social media can foster. … The number of inbound leads continues to increase as our footprint expands."

Baruch Labunski, CEO of SEO marketing agency Rank Secure said these videos "can be anything from branding ads to using cute animals to how-to videos."

"They can be made cheaply and cost nothing to post but can easily reach specific target audiences," he said.

Milks said in his experience, the most effective methods of digital advertising today focus on authenticity and education. He said video content has been a game-changer, especially on platforms like YouTube.

"Advisors can connect emotionally by breaking down complex topics into digestible, client-friendly pieces," he said.

Search engine optimization still reigns supreme

Advisors often rely on using specific keywords to try to ensure their content ranks highly and is therefore found easily by prospective clients. Using search engine optimization (SEO) is still an unmatched way to generate organic leads, said Firdaus Sateem, founder of digital marketing firm VoidSEO.

"Google remains the top source for high-intent traffic, and optimizing your site ensures your business gets found when it matters," he said. "Unlike ads that stop when the budget runs out, SEO builds long-term visibility and authority. For advisors, this means attracting potential clients who are already searching for your services."

Carradean Farley, co-founder of digital marketing firm Periscope Media, said clients who rank well organically in Google search have outsize returns when

compared to paid methods, such as pay-per-click and display ads.

"The difficult thing is paid marketing channels are more expensive, but there is a higher likelihood of success. Whereas an advisor who is ranked organically in Google will see lower cost per conversion, acquisition cost of clients and marketing spend, but this method is much harder to pull off because Google is constantly changing," he said. "But if it can be pulled off, our clients reap the rewards."

Sprung said digital marketing has become an integral part of how his firm connects with both the families they already serve and prospective clients seeking financial guidance.

"For advisors who rely on referrals, remember that the first thing someone will do after being given your name is look you up," he said. "If you have no online presence, it speaks volumes."

Email newsletters allow ongoing, direct connection

In addition to having a professional and up-to-date website, one of the most effective digital marketing tools an advisor could use today is an email-newsletter campaign manager, said Banasz. Newsletters cost relatively little and can include market updates, monthly communications, celebratory events, video communications, birthday and anniversary announcements, prospecting campaigns and more.

"You can develop a true client communications strategy, an important information update system, and a prospecting program with analytics for tracking success including open rate, engagement success and forwarded emails," he said.

Tim Berney, founder and CEO of marketing agency VI Marketing and Branding, said collecting email addresses and other related data is essential for advisors "so that you can make direct connections ongoing."

Trout said email marketing delivers strong returns when properly segmented.

"The industry has shifted toward specialized demographic targeting, with particular focus on women investors and generational wealth transfer," he said.

Prospecting via LinkedIn

LinkedIn continues to dominate as the strongest social platform for advisors, particularly for reaching high net worth individuals, said Trout.

Likewise, in terms of return on investment, Milks said LinkedIn has "proven invaluable" for connecting with professionals and business owners.

Said Israilov, a financial planner and wealth manager at Israilov Financial in San Francisco, said his firm leverages LinkedIn's Sales Navigator tool to search for

and engage with prospects. He said the Sales Navigator allows him to effectively screen and track prospects that match the firm's niche client demographic.

"Some of our favorite screening filters we use are geography, job function, seniority level, years of experience and profile language," he said. "Using these filters, we can identify a list of LinkedIn users to engage and develop relationships with over time."

Advisors incorporating AI into digital marketing

The recent ability to incorporate AI into content creation has been a "big win" for advisors, said Banasz.

"Many advisors struggled to create or author their own material and ended up using the pre-selected or pre-approved material every other advisor had at their disposal," he said. The ability to insert your own thoughts and ideas into a program and have AI create a finished product is a huge advancement."

Trout said the most effective approaches combine AI-powered content curation with multichannel communication and data-driven personalization.

"This allows advisors to maintain consistent, meaningful client engagement without spending excessive time creating content," he said. "Successful advisors are leveraging integrated platforms that offer automated compliance workflows, behavioral finance insights and targeted content distribution across multiple channels."

Milks said advisors who embrace the shift toward transparent, educational marketing will likely see the most success.

"The key is balancing automation with a personal touch to ensure prospects feel seen and heard, even in the digital space," he said.